



Engagement Builder
powered by ACCESSGOV™

User Manual

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Engagement Builder Overview

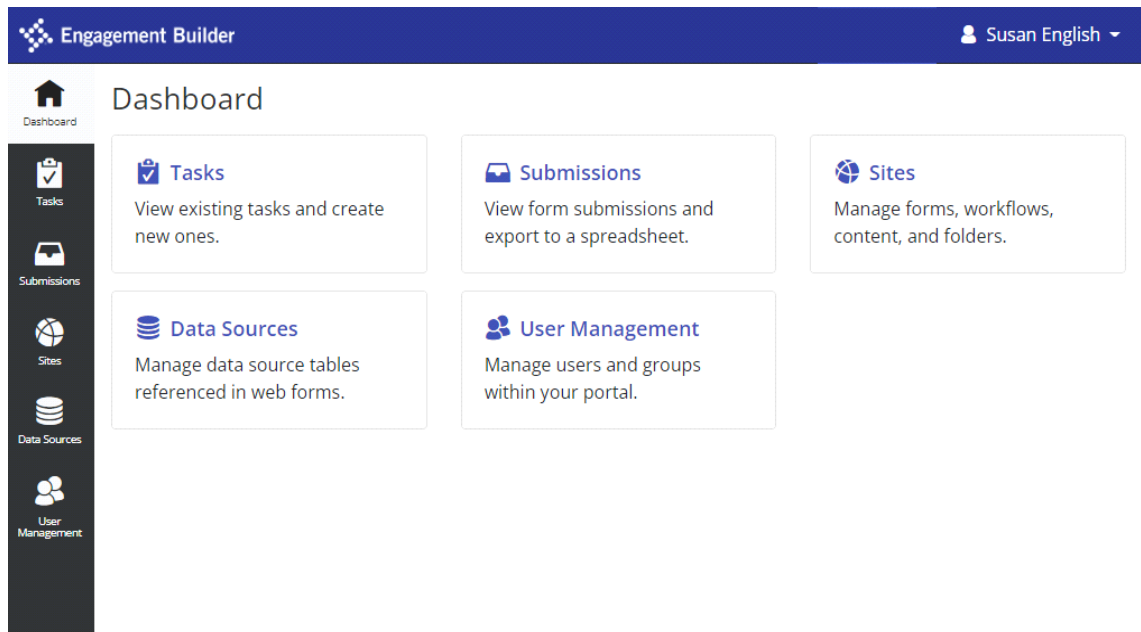
Engagement Builder is a self-service digital platform, powered by AccessGov, that allows you to create engagements for resident (citizen) users that support interactions with government agencies and universities. The goal is to create engagements for users that makes online access a seamless process.

You can build web forms, provide PDF files, and link to existing third-party services using this versatile application. You can also extend the platform by adding plugins or middleware to provide custom solutions.

Engagement Builder lets you publish engagements to a built-in citizen portal, to the Tyler/NIC Gov2Go application, or to embedded features in your own website.

After you log into the application, the Home page, which defaults to the Dashboard, displays. Click a link on the Dashboard page or on an icon in the left navigation to access the following options.

- **Tasks**
- **Submissions**
- **Sites**
- **Data Sources**
- **User Management**



Engagements Overview

Engagements are forms you design for residents using self-service components. When you click the **Sites** icon, the Sites pane displays a list of tenant (partner) sites and all engagements in those areas. As a partner, your agency or department can have multiple sites. Within a site, you can create multiple folders that allow you to partition information and set permissions and roles for users.

Area/Site	Label	Status	Type	Last Modified	By
Josh Site (ET)	2019 - Improve Max Permitted File size setting	Draft	Submittable Form	6/20/2023, 12:07:15 PM	Josh
Josh Site (ET)	3121 - Workflows starting with Reviewer Forms shouldn't be accessible in Sites	Draft	Workflow	5/15/2023, 3:17:25 PM	Josh
Josh Site (ET)	3293	Published	Submittable Form	6/29/2023, 8:54:31 AM	Josh
Josh Site (ET)	3833 - pre test	New	Submittable Form	10/10/2022, 4:09:51 PM	Ellen
Josh Site (ET)	3888-demo	Published	Submittable Form	10/7/2022, 11:29:03 AM	Madhuri Das
Josh Site (ET)	3946 - Importing WIs site to test	Draft	Workflow	5/15/2023, 3:20:35 PM	Josh
Josh Site (ET)	3975 - FL session timeouts occurring again - Already Paid	Published	Workflow	4/21/2023, 1:15:37 PM	Ellen
Josh Site (ET)	4047 - Public Session Expired re-login	Published	Submittable Form	12/7/2022, 3:23:15 PM	Ellen
Josh Site (ET)	4086 One	Published	Submittable Form	1/18/2023, 1:50:37 PM	Craig Fisher

Engagement Types

The type of engagement you select determines which functions display in the Toolbox to create the engagement. Type also determines the process a user follows in the engagement.

The types of engagements are:

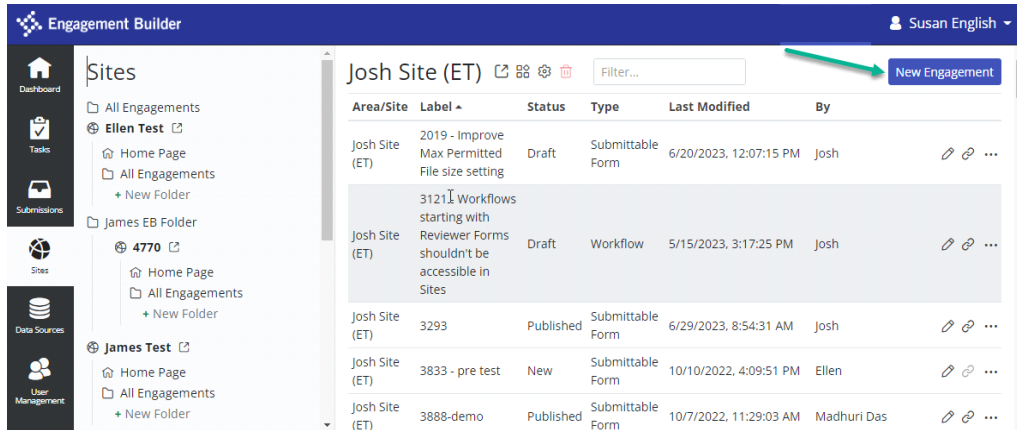
- **Submittable Form** – Used to collect data from users.
- **Static Content** – Displays the same content to all users (for example, an instruction page or contact list with associated phone numbers).
- **Dynamic Content** – Displays information based on answers a user selects. This type of engagement does not require any submission on the part of the user.
- **Call to Action** - Links to an existing application or PDF file. This engagement type is useful if, as a partner, you have an extensive portfolio who want to expand your directories.
- **External Link** – Sends users to an existing URL. This is similar to **Call to Action** but allows you to bypass a landing page and redirect the user to an existing website.
- **Workflow** – Allows information to be collected and processed through a series of customizable “back-office” automated or administrative tasks. This type builds on top of existing engagements
- **Clone Engagement** - Creates a copy of an existing engagement within the same tenant site.

Create a New Engagement

You can create a new engagement within an existing site or folder. However, you cannot create a new engagement under the **All Engagements** area.

To create an engagement:

1. In the left navigation pane, click the **Sites** icon.
2. On the Sites page, click the **New Engagement** button.



3. On the New Engagement page, enter or select the following information:

- **Name** – Enter a name for the engagement. This is used in the Admin Builder to identify the engagement (form) to internal and external users. The name also shows the form status in the My Forms section.
- **Type** – Select the type of engagement. This determines the functions that will be available to create the engagement and the process a user follows in an engagement.

Note: The type of engagement you select determines the information required to finalize the engagement form. Refer to [Engagement Types](#) for more information.
- **Description** – Enter a description of the engagement. This information becomes part of the search index when a resident searches for a published engagement.

4. Click **Create**.

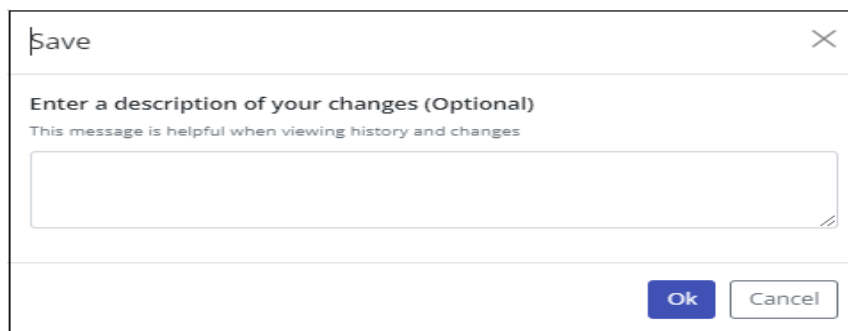
The new engagement displays under All Engagement for the selected site.

Edit an Engagement

You can edit an existing engagement in the Admin Builder.

To edit an engagement:

1. In the left navigation pane, click the **Sites** icon.
2. Select a site from the list of Engagements.
3. On the Site page, locate the engagement you want to edit and click the **Edit** (✎) icon.
4. In the Builder, make the necessary changes and click **Save** in the top menu.
5. In the **Save** dialog box, you have the option to enter a description of the changes.



6. Click **Ok**.
7. Optional. Click the **Preview** button to view the modified engagement.
8. Optional. Click the **Publish** button to publish the engagement. For information about publishing, refer to [Publish an Engagement](#).
9. Click **Exit** to return to the Sites pane.

Move an Engagement

You can move an existing engagement to another area but only within the same site. For example, you may determine that an employee medical engagement belongs in the HR > Medical folder instead of in the main HR folder. You can then set permissions for the HR > Medical folder so that only a specific group of people can review submissions in this folder or build new engagements.

Note: You cannot move an engagement to another site.

To move an engagement:

1. In the left navigation pane, click the **Sites** icon.
2. Select a site from the list.
3. On the Site pane, click **All Engagements**, locate the engagement you want to move, and click the three dots to the right of the engagement.
4. Select **Move** from the drop-down list.



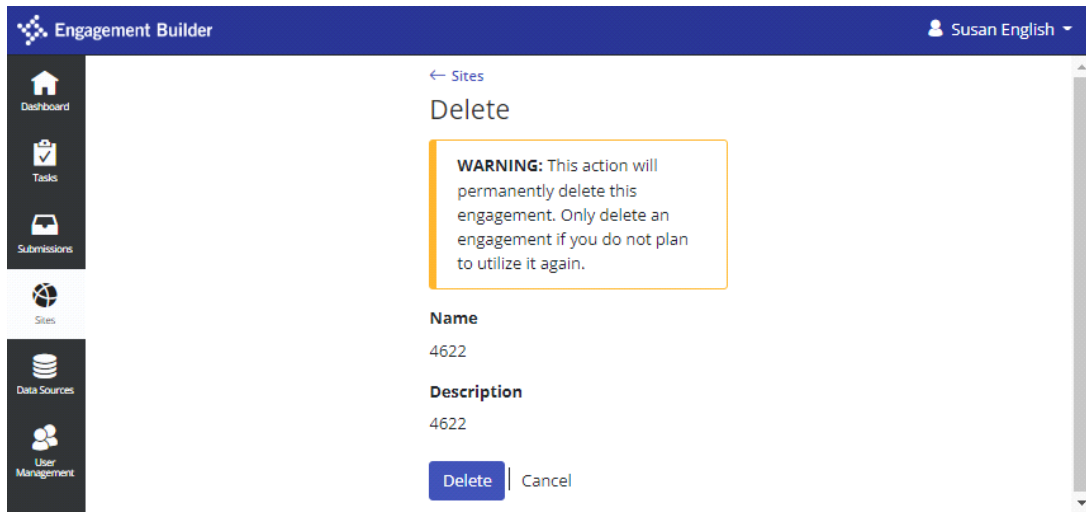
5. In the Move pane, select a target location from the **Move** drop-down list.

Delete an Engagement

You can delete an engagement from an existing site.

To delete an engagement:

1. In the left navigation pane, select the **Sites** icon.
2. Select a site from the list.
3. On the Site pane, click **All Engagements**, locate the engagement you want to delete, and click the three dots to the right of the engagement.
4. Select **Delete** from the drop-down list. A warning message prompts you to verify that you want to permanently delete the engagement.



5. Click **Delete**.

Test an Engagement

You can test an engagement as a user prior to publishing it. The test option also allows you to access an engagement as a user after it is published but without having the test submissions show in the production submissions list.

To test an engagement:

1. In the left navigation pane, select the **Sites** icon.
2. Select a site from the list.
3. On the Site pane, click **All Engagements**, locate the engagement you want to test, and click the three dots to the right of the engagement.
4. Select **Test** from the drop-down list to display the engagement.
5. Make any changes to the engagement (form) and click **Save and Exit**.

Clone an Engagement

You can create a second version (or clone) of an engagement so you can test content without publishing the engagement.

To clone an engagement:

1. In the left navigation pane, select the **Sites** icon.
2. Select a site from the list.
3. On the Sites pane, click **All Engagements**, locate the engagement you want to 'clone,' and click the three dots to the right of the engagement.
4. Select **Add Version** from the drop-down list.
5. On the New Engagement pane, enter the name and version of the engagement in the appropriate fields.

Engagement Builder

Susan English

← Sites

New Engagement

Name
The name of the engagement shown to the user
4086 Two

Version Label
The version of the engagement shown to the user
2

Type
Which of these best describes the engagement?

- Submittable Form
Collect data from users.
- Static Content
Display the same content to all users.
- Dynamic Content
Take user input to determine content.
- Call to Action
Link to an existing application or PDF.
- External Link
Directly send users to an existing URL.
- Workflow
Process data from users with a workflow.
- Clone Engagement**
Create a copy of an existing engagement.

Clone from
4086 Two

Create Cancel

6. Click **Create**.
7. In the Admin Builder, make changes to the new version and click **Save**.
8. In the **Save** dialog box, you have the option to enter a description of the changes.

Save

Enter a description of your changes (Optional)
This message is helpful when viewing history and changes

Ok Cancel

9. Click **Ok**.
10. Click **Exit** to return to the Sites pane. The cloned version of the engagement displays in the list.

Selection for an Engagement

There are two types of URLs available for engagements.

- **Public URL** – This takes you to the published version of the form on the user site.
- **Test URL** – This takes you to a test site where you can view and test the last saved version of the engagement prior to submitting it for publication to the resident site.

Create Engagement Folders

Folders allow you to organize engagements by agency or department and set permissions.

To create an engagement folder:

1. In the left navigation pane, select the **Sites** icon.

2. On the Site pane, locate the site where you want to add a folder and click **+ New Folder**.

The screenshot shows the Engagement Builder interface. On the left, the 'Sites' pane is visible, showing a tree view of sites: Ellen Test, James EB Folder (4770), and James Test. Under 'James EB Folder', there is a '+ New Folder' button highlighted with a green arrow. The main area displays a table of engagements for 'Josh Site (ET)'. The table has columns: Area/Site, Label, Status, Type, Last Modified, and By. The table contains several rows of engagement data.

Area/Site	Label	Status	Type	Last Modified	By
Josh Site (ET)	3121 - Workflows starting with Reviewer Forms shouldn't be accessible in Sites	Draft	Workflow	5/15/2023, 3:17:25 PM	Josh
Josh Site (ET)	3293	Published	Submittable Form	6/29/2023, 8:54:31 AM	Josh
Josh Site (ET)	3833 - pre test	New	Submittable Form	10/10/2022, 4:09:51 PM	Ellen
Josh Site (ET)	3888-demo	Published	Submittable Form	10/7/2022, 11:29:03 AM	Madhuri Das
Josh Site (ET)	3946 - Importing WIS site to test	Draft	Workflow	5/15/2023, 3:20:35 PM	Josh
Josh Site (ET)	3975 - PL session timeouts occurring again - Already Paid	Published	Workflow	4/21/2023, 1:15:37 PM	Ellen
Josh Site (ET)	4047 - Public Session Expired re-login	Published	Submittable Form	12/7/2022, 3:23:15 PM	Ellen

3. In the **New** dialog box, enter information in the following fields.

- **Display Label** – Enter the label (name) of the folder.
- **Name in URL** – Optional. If a URL is required, enter the appropriate information.
Note: You can provide an ID in the URL field to identify an application and make it easier for your users to identify and avoid listing an entire character string that may not be useful when posted to your CMS (for example, `foia-request`).
- **Confirm Name in URL** – Optional. You must re-enter the URL information.

The 'New' dialog box is shown with the following fields and instructions:

- Display Label**: A text input field.
- Name in URL**: A text input field. Below it, the text reads: "Optional. Must contain only lowercase letters, numbers, or dashes."
- Confirm Name in URL**: A text input field. Below it, the text reads: "To confirm the correct Name in URL was entered, please enter again."

A warning box with an orange border contains the text: "Once created, the Name in URL should be updated with caution because it will break any user bookmarks or existing links on external engagements."

At the bottom, there are two buttons: **Create** and **Cancel**.

4. Click **Create**.

The new folder displays in the list of engagements under the selected site.

Embed Widgets into an External Site

If you want to embed widgets in your website, please contact your Tyler Technologies partner. You can only use widgets for Engagement Builder sites that are public. User must have the **Visitor** role in the site from which the widget code is copied.

User Management Overview

This section addresses the management of users: Users (individuals) and Groups (members). Roles are added to Users and Groups based on functions individuals or group members need to perform to manage engagements.

User and Group Roles

The roles you can assign to a user or group dictate the options individuals or group members have for editing, managing, testing, reviewing, and publishing engagements. The available roles are:

- **Admin** – Allows a user to publish, move, and delete forms and content, manage folders, and edit data sources.
- **Page Editor** – Allows a user to edit and test forms and content but does not allow a user to publish a form.
- **Power Editor Add-on** – Enables advanced page editor functionality, such as custom validation, calculations, and creative data mapping outside of the options available to a **Page Editor**.
- **Publisher Add-on** – Allows publishing, modifying, moving, and deleting of forms and content. You can make published forms and content available immediately or on a scheduled basis. This allows you to save drafts and only release content when the information is finalized.
- **Reviewer** – Allows a user to review submissions at appropriate levels.
- **Reviewer Manager** – Allows a user to review submissions, view all tasks associated with a submission, and bypass workflows.
- **Tester – Reviewer** – Allows a user to review test submissions.
- **Tester – Visitor** – Allows a user to view test content and submit test forms.
- **User Manager** – Allows a user to manage users and groups and can only be added at the tenant level.
- **Visitor** – Allows a user to view content and submit forms in a private portal. This enterprise feature allows you to develop internal internet sites that are scoped to your specific needs and requirements.

Test Roles ×

<input type="checkbox"/> Admin	Publish, move, and delete forms and content, manage folders, and edit data sources.
<input type="checkbox"/> Page Editor	Edit and test forms and content (cannot publish).
<input type="checkbox"/> Power Editor Add-on	Add-on that enables advanced page editor functionality.
<input type="checkbox"/> Publisher Add-on	Add-on that allows publishing, moving, and deleting of forms and content.
<input type="checkbox"/> Reviewer	Review submissions.
<input type="checkbox"/> Reviewer Manager	Review submissions, view all tasks and bypass workflows.
<input type="checkbox"/> Tester - Reviewer	Review test submissions.
<input type="checkbox"/> Tester - Visitor	View test content and submit test forms.
<input type="checkbox"/> User Manager	Manage users and groups.
<input type="checkbox"/> Visitor	View content and submit forms.

User Dynamics

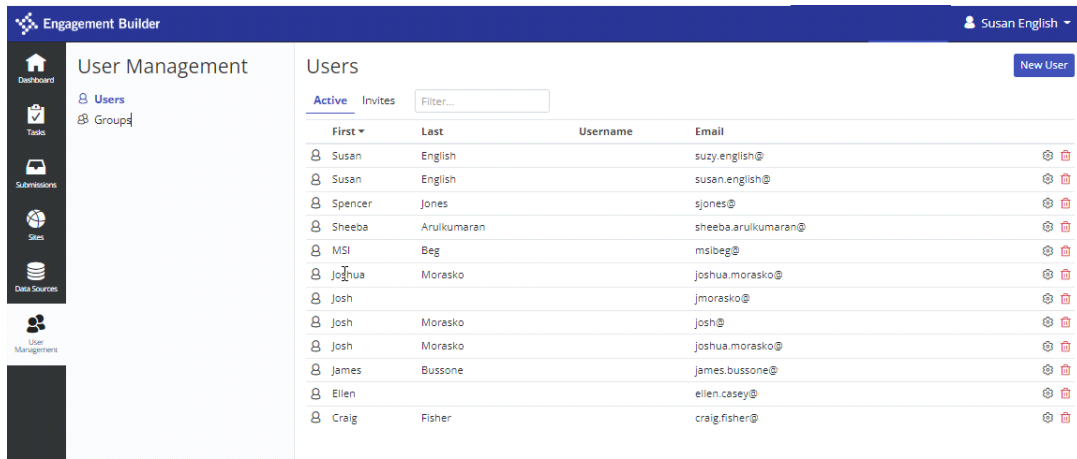
You can add a user to the Engagement Builder application and set the roles (permissions) for an individual user at the top level or at the site or folder level. You can also modify roles for existing users.

Invite a User

You can invite a user to join Engagement Builder

To create a new user:

1. In the left navigation pane, click **User Management**.
2. On the User Management page, click the **New User** button.



The screenshot displays the 'User Management' page in the Engagement Builder application. The page title is 'User Management' and the user profile is 'Susan English'. The main content area is titled 'Users' and contains a table with the following data:

First	Last	Username	Email
Susan	English	suzy.english@	
Susan	English	susan.english@	
Spencer	Jones	sjones@	
Sheeba	Arulkumaran	sheeba.arulkumaran@	
MSI	Beg	mslbeg@	
Joshua	Morasko	joshua.morasko@	
Josh	Morasko	jmorasko@	
Josh	Morasko	josh@	
Josh	Morasko	joshua.morasko@	
James	Bussone	james.bussone@	
Ellen		ellen.casey@	
Craig	Fisher	craig.fisher@	

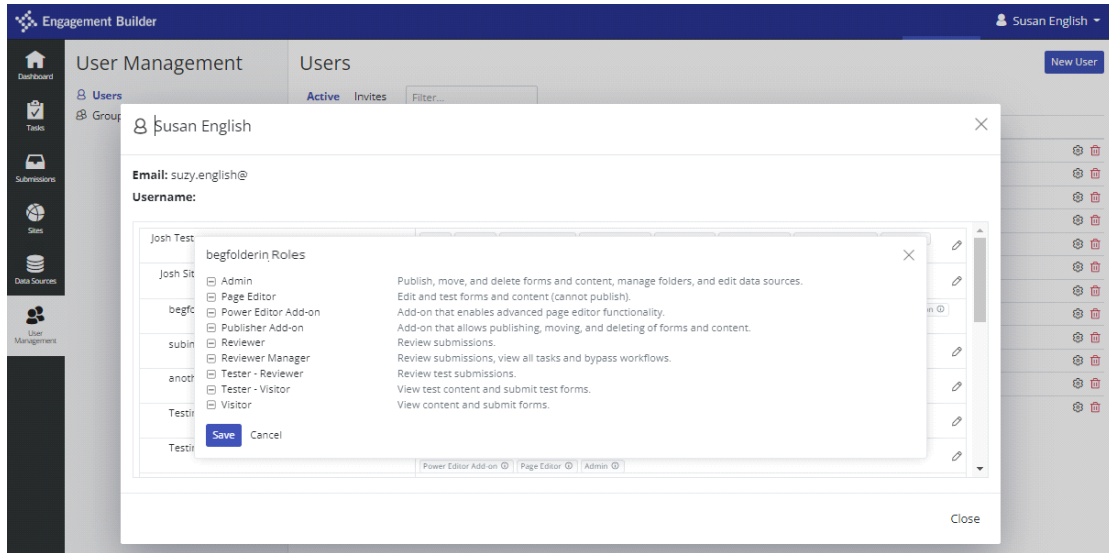
3. In the **New User** dialog box, enter the following information.
 - **First** – Enter the user's first name.
 - **Last** – Enter the user's last name.
 - **Email** – Enter the user's email address.
4. Click the **Edit** (✎) icon next to the user area where you would like to apply the roles for the newly created user.
5. Click **Save**.
6. In the **New User** dialog box, click **Send Invite**. An email notification is then sent to the user.

Modify User Roles

You can modify roles for existing users at any time.

To modify a user's roles:

1. On the User pane, click the **Settings** (⚙️) icon next to the user name.
2. In the user's dialog box, click the **Edit** icon next to the folder you want to modify.
3. In the **Roles** dialog box, select the roles you want to apply and click **Save**.
4. Click **Close** to exit.



Group Dynamics Overview

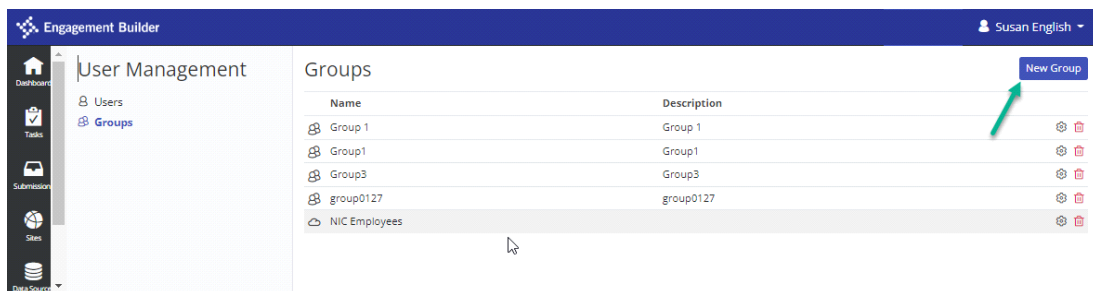
Roles and permissions are added at the top level of a Group or at the site or folder level. This allows you to manage who has permission to view or access specific engagements. For example, you may have a Human Resources site that contains multiple folders. You can manage folder content by setting roles for users thereby controlling access to engagements.

Create a New Group

You can create or add a new group under User Management

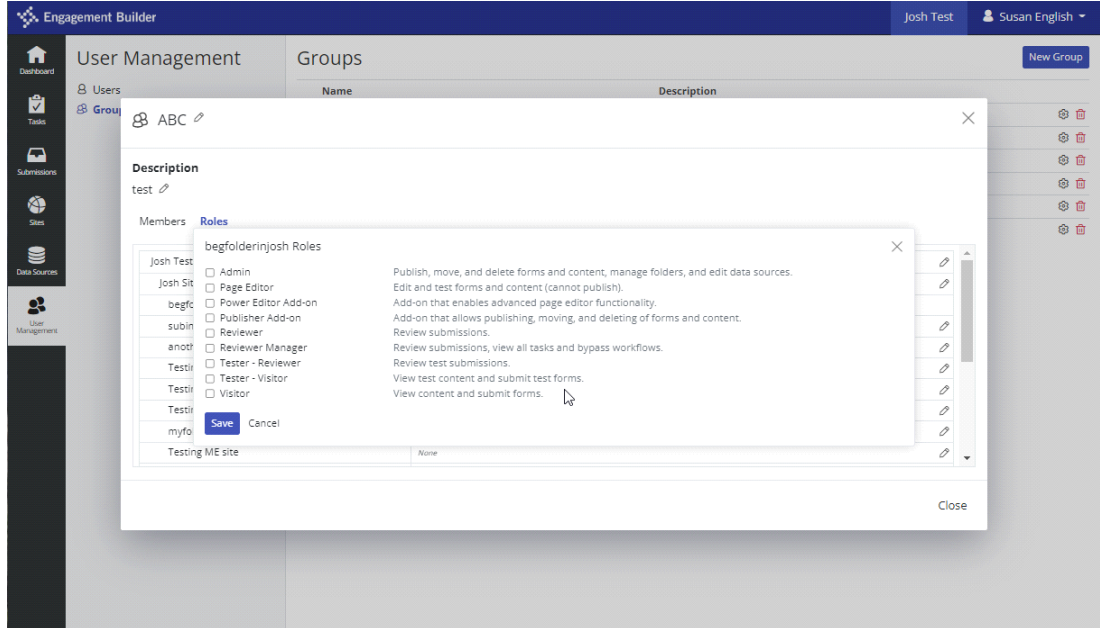
To create a group:

1. In the left navigation pane, click **User Management**.
2. On the User Management page, click **Groups**.
3. In the Groups section, click **New Group**.



4. In the **New Group** dialog box, from the **Type** drop-down list, select an option, and enter the appropriate information if required.
5. Click **Add**.
6. In the Groups pane, click the **Settings** (⚙️) icon for the newly created group.
7. In the **Group** dialog box, complete any or all of the following actions.
 - **Add Members** button – To add a member, click the **Add Members** button. Click **Add** next to the member's name, and then click **Done**.

- **Member** tab – From the **Add** a drop-down list, click **User** or **Group**. Click **Add** next to the User or Group you want to add and then click **Done**. Click **Close** to exit.
- **Roles** tab – Click the **Edit** (✎) icon next to the area where you want to modify roles. In the **Roles** dialog box, select the roles and click **Save**. Click **Close** to exit.



Modify Group Roles

You can modify or update the roles for an existing group.

To update an existing group:

1. In the left navigation pane, click **User Management**.
2. On the User Management page, click **Groups**.
3. In the Groups pane, click the **Settings** (⚙️) icon for the group you want to modify.
4. In the **Group <name>** dialog box, perform any or all of the following actions.
 - **Members** tab - To delete a member, click the **Delete** icon. A dialog box prompts you to confirm that you want to delete the selected member.
 - **Add Members** button - To add a member, click the **Add Members** button. Click **Add** next to the member's name and then click **Done**.
 - **Roles** tab – Click the **Edit** (✎) icon next to the area where you want to modify roles. In the **Roles** dialog box, select the roles and click **Save**. Click **Close** to exit.

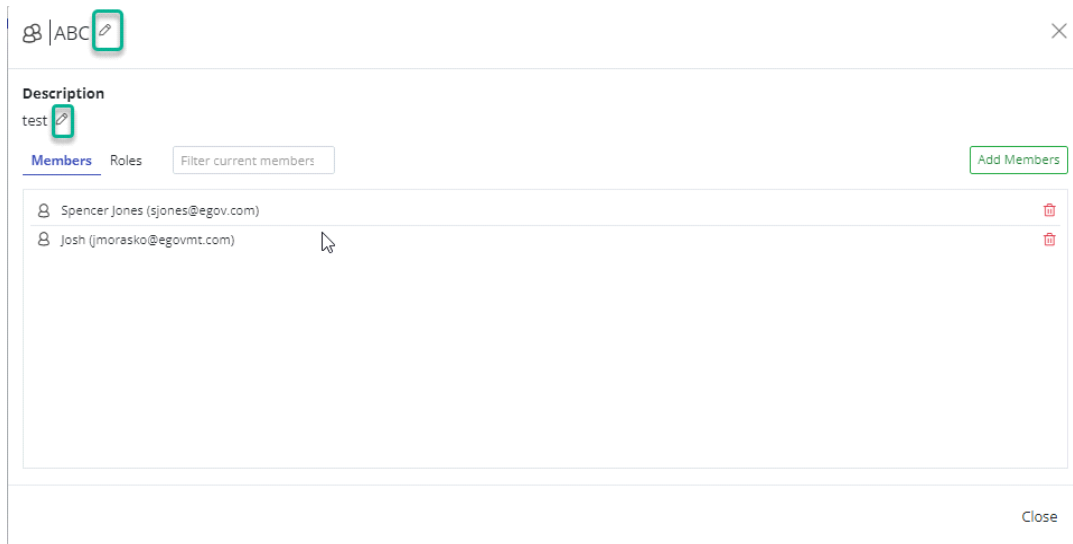
Modify the Group Display Label and Description

You can change the name or description of a group.

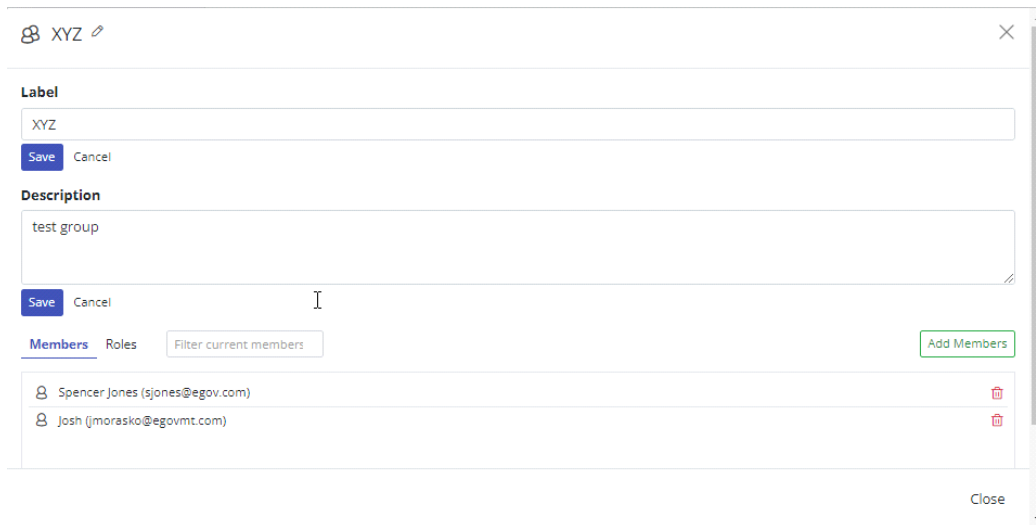
To change a display label:

1. In the left navigation pane, click **User Management**.
2. On the User Management page, click **Groups**.

3. In the Groups pane, click the **Settings** (⚙️) for the group you want to modify.
4. In the **Group <name>** dialog box, click the **Edit** (✎) icons next to the **Label** and **Description**.



5. Enter your changes in the **Label** and **Description** fields and click the **Save** buttons.



6. Click **Close** to exit.

Delete a User or Group

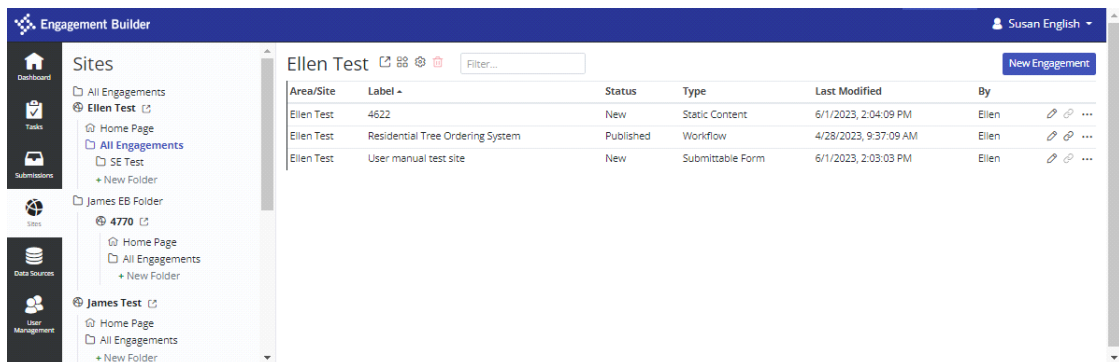
In the User Management pane, click the **Delete** icon to remove a user or group from Engagement Builder. A confirmation message prompts you to confirm the deletion.

Sites and Builder Overview

Engagement Builder allows you to create engagements using the Builder drag-and-drop designer. The flexibility of the Builder lets you customize the look of engagements without writing code. This section provides information about how to access the Builder tools to create engagements.

The following information displays when you select **Sites** from the left navigation and click an existing site.

- **Area/Site** – Displays the current site name.
- **Label** – Displays the name of the engagement and is defined when you click the New Engagement button.
- **Status** - Displays the status of the engagement.
- **Type** – Displays the type of engagement. Refer to [Engagement Types](#) for more information.
- **Last Modified** – Displays the date and time the engagement was last modified.
- **By** – Displays the name of the person who last modified the engagement.



The screenshot shows the Engagement Builder interface. The left navigation pane is expanded to 'Sites', showing a tree view with 'Ellen Test' selected. The main content area displays a table of engagements for 'Ellen Test'. The table has columns for Area/Site, Label, Status, Type, Last Modified, and By. There are three rows of engagement data.

Area/Site	Label	Status	Type	Last Modified	By
Ellen Test	4622	New	Static Content	6/1/2023, 2:04:09 PM	Ellen
Ellen Test	Residential Tree Ordering System	Published	Workflow	4/28/2023, 9:37:09 AM	Ellen
Ellen Test	User manual test site	New	Submittable Form	6/1/2023, 2:03:03 PM	Ellen

Access Builder to Modify an Engagement

This section provides information for how you can access the Builder home page and modify existing engagements.

There are two ways to access the editor mode.

- **Editor Mode** – This mode loads an engagement after you click the **Create** button.
- **Power Editor** – This mode allows you to control more functionality. Although you can switch from Power to Editor mode,

Note: Although you can switch from Power to Editor mode, this is not recommended as this prevents the ability to use calculations in an engagement.

You can toggle between the two editor modes, but you should use caution as switching from **Power Editor** to **Editor** removes the ability to use calculations in an engagement.

Edit an Engagement

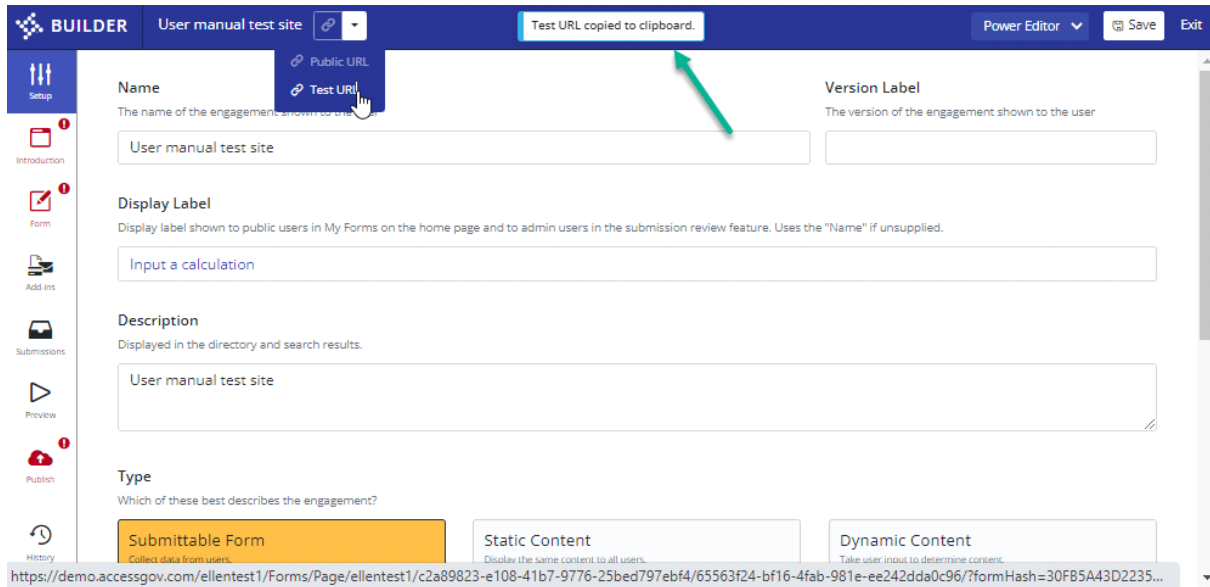
You need to access an engagement from the Sites page to edit content.

1. On the Engagement Builder page, click the **Sites** icon in the left navigation.
2. On the Sites page, locate and click the Site that contains the engagement you want to edit.
3. On the Sites pane, click the **Edit** icon to access the Builder.

There are two editing mode levels: Basic Editor and Power Editor (advanced functionality). Refer to [User and Group Roles](#) for more information.

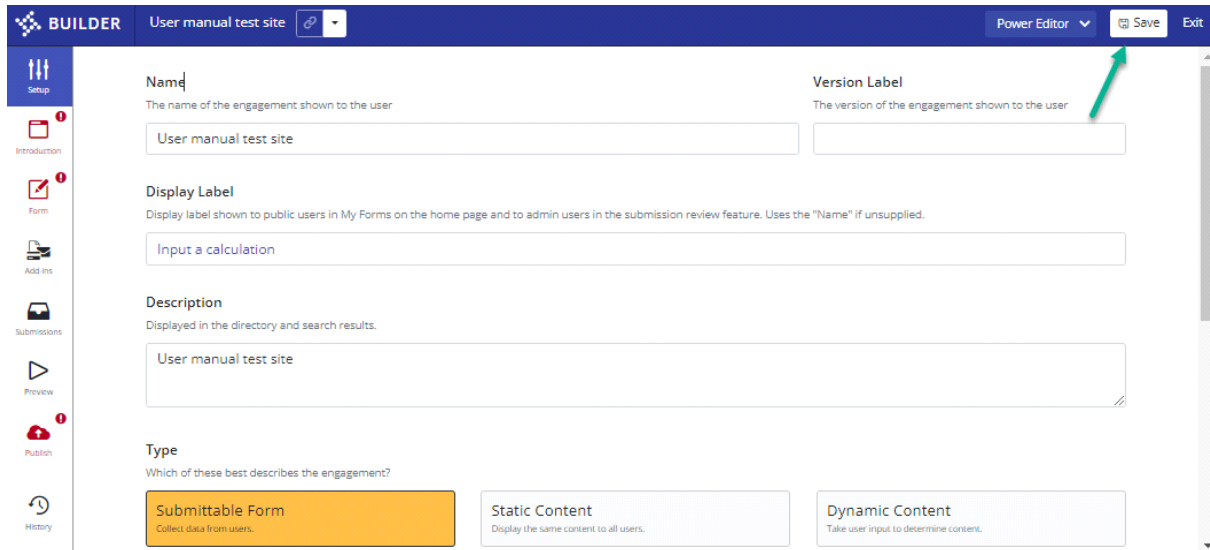
Copy Engagement URL

You can copy the URL for the engagement by clicking the URL link drop-down list. The URL is copied to the clipboard.



Save Engagement

You can click the **Save** button to save updates to the engagement without publishing the changes to a site users can access.



Build a Type of Engagement

This section provides information on how to build various types of engagements. Refer to [Engagement Types](#) for a list of engagements you can create.

You can add an engagement to a specific site or select a folder and place the engagement there.

Builder Top Navigation Options

The Builder top navigation contains the following features.

- **URL Link** – Select **Public URL** or **Test URL** from the drop-down list. The URL is then copied to the Clipboard.
 - Click **Public URL** to view the published engagement. The **Public URL** is only available after you publish the engagement.
 - Click **Test URL** to view and test the current version of the engagement. Only users with the **Tester – Visitor** role can perform this function. Refer to [User and Group Roles](#) for more information.
- **Editor** – Select **Power Editor** or **Basic Editor** from the drop-down list. **Power Editor** is only available if you have this add-on role.
- **Save** – Click this button to save a draft of the current engagement without publishing the content. In the **Save** dialog box, enter a description of your changes and click **Ok**.
- **Revert** – On the Sites pane, click this icon to revert to a previous version of the engagement.
- **Exit** – Click this button to return to the Sites pane.



Create a Submittable Form

A Submittable Form is a web form that is used to collect data from your users.

Note: You can upgrade a Submittable Form to a Workflow form type. Refer to [Workflow Form Type](#) for additional information.

To create a Submittable Form:

1. In the left navigation, click the **Sites** icon.
2. Select the site or folder from the **Sites** list.

Area/Site	Label	Status	Type	Last Modified	By	
Ellen Test	4622	New	Static Content	6/1/2023, 2:04:09 PM	Ellen	Edit Copy More
Ellen Test	Residential Tree Ordering System	Published	Workflow	4/28/2023, 9:37:09 AM	Ellen	Edit Copy More
SE Test	Static Test	New	Static Content	7/31/2023, 11:57:22 AM	Susan English	Edit Copy More
Ellen Test	User manual test site	New	Submittable Form	6/1/2023, 2:03:03 PM	Ellen	Edit Copy More

3. Click the **New Engagement** button.
4. On the New pane, in the **Name** field, enter a name for the engagement.
5. In the **Type** section, click the **Submittable Form** button.

6. In the **Description** field, enter information that will display in the directory and can be used for search indexing criteria.
7. Click **Create**.

Manage Setup Options for a Submittable Form

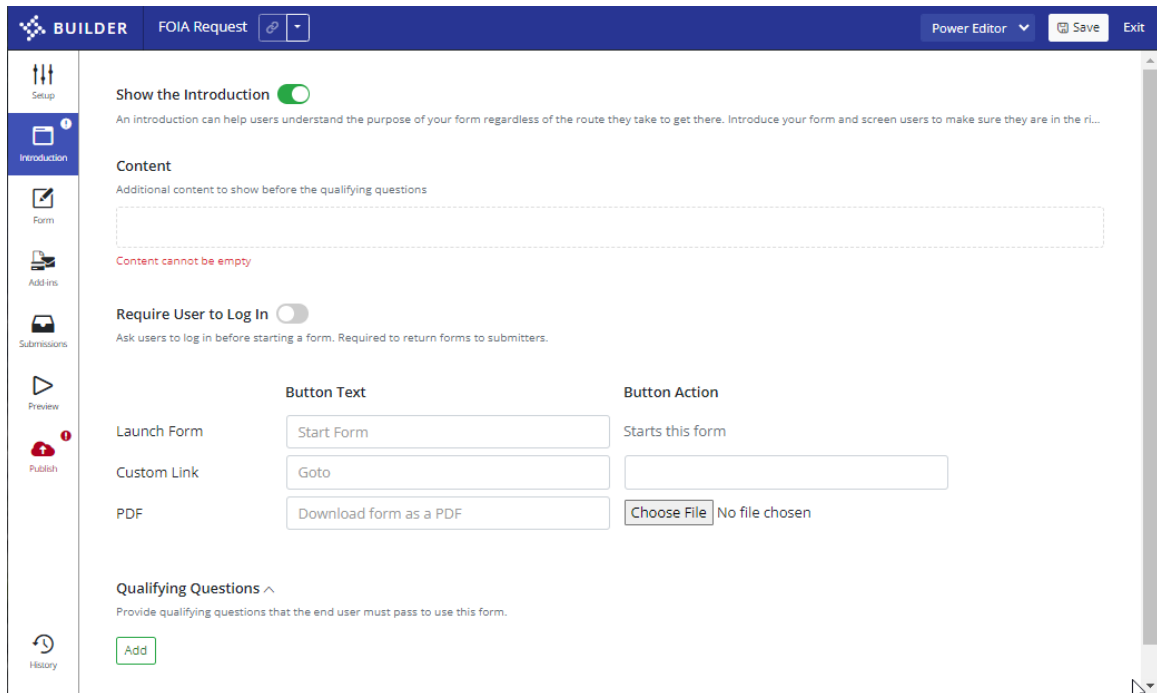
The Setup page displays the high-level information you provided when creating the engagement along with additional options.

- **Name** – This is the name of the engagement you entered on the New pane. The **Name** displays to the users and under the **Label** column in the Admin.
- **Version Label** – This field displays to the user and allows you to differentiate between versions of an engagement.
- **Display Label** – Optional. This can be used to make the engagement more robust such as pulling in form data. However, if no content is added, the form defaults to the information provided in the **Name** field.
- **Description** – This information displays in the directory and search results.
- **Type** – This is the type of engagement you selected. Refer to [Engagement Types](#) for more information.
- **Name in URL** – It is recommended that you provide a URL to avoid maintenance issues, such as dealing with multiple strings of IDs in the public URL your site (for example, `foia-request`). The URL makes direct linking more manageable and user friendly.
- **Allow Multiple In-Progress Forms** -This option is turned off by default and it is recommended that you leave the default setting. The option allows a user to open multiple in-progress forms, which can be confusing to a user.
- **Submit Button Text** – In most instances, this is fixed text.

Manage Introduction Options for Submittable Forms

The Introduction page allows you to provide more information to the user about the purpose of the engagement before the user can access the Submittable Form.

- **Show the Introduction** – Default is set to **On**, which requires you to provide an introduction page for the engagement. If this option is set to **Off**, no other fields display.
- **Content** – Required if Show the Introduction is set **On**. Enter the introductory or overview information you want to display to the user.
- **Require User to Log In** – This option allows you to require a user to log in before accessing the form. If you have a private site, the user is required to log in. However, if you have a site that is publicly exposed, you can request the user log in to support the user's ability to save selections.
- **Button Text** – This text determines what displays to a user on the introduction page for each item (Launch Form, Custom Link, PDF).
- **Qualifying Questions** – This pre-screening feature determines whether a user can proceed to the form. For example, you can ask if a user has moved in the past 6 months. If no, the user can proceed. If yes, the user cannot access the form.

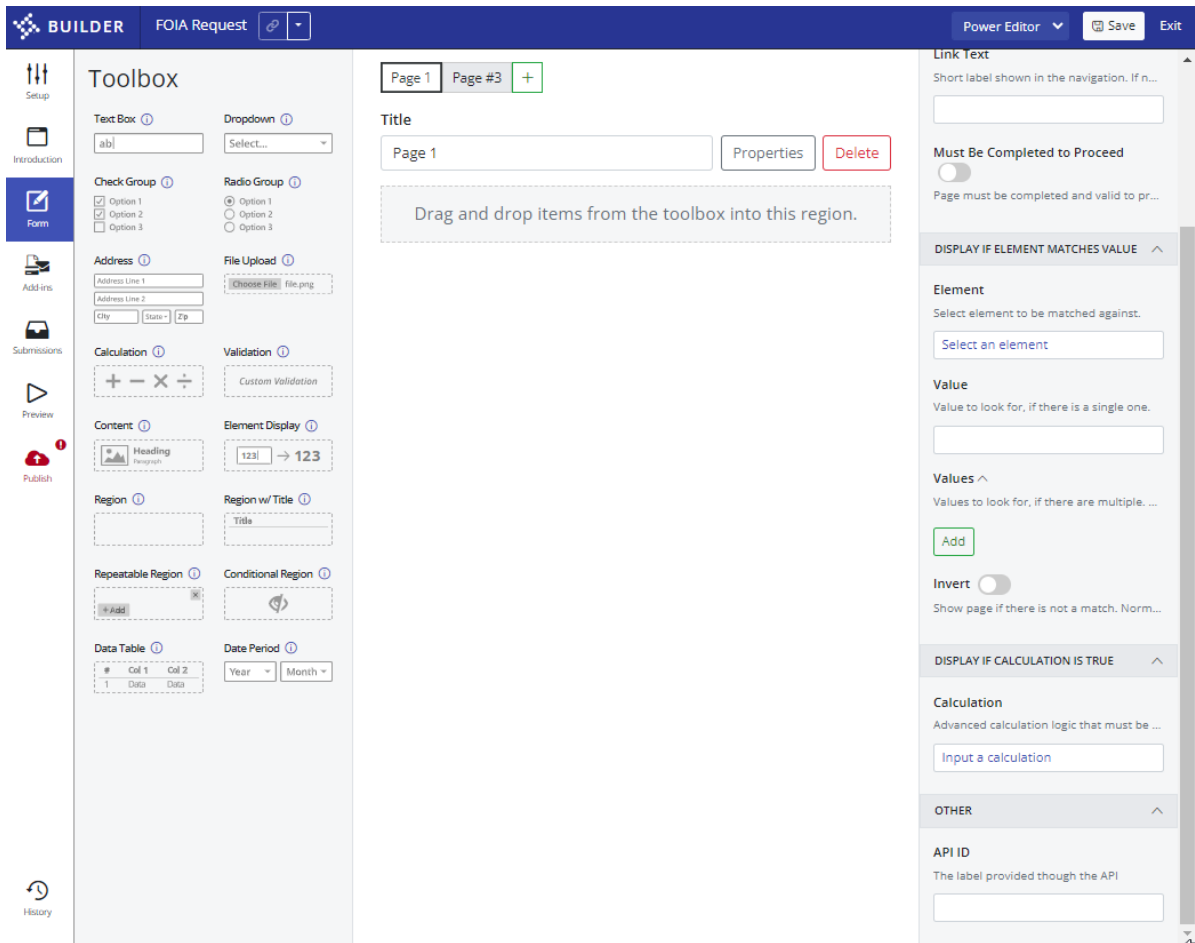


Manage Form Builder Elements for a Submittable Form

This page lets you build the actual application. The page contains a Toolbox, Form, and Settings section.

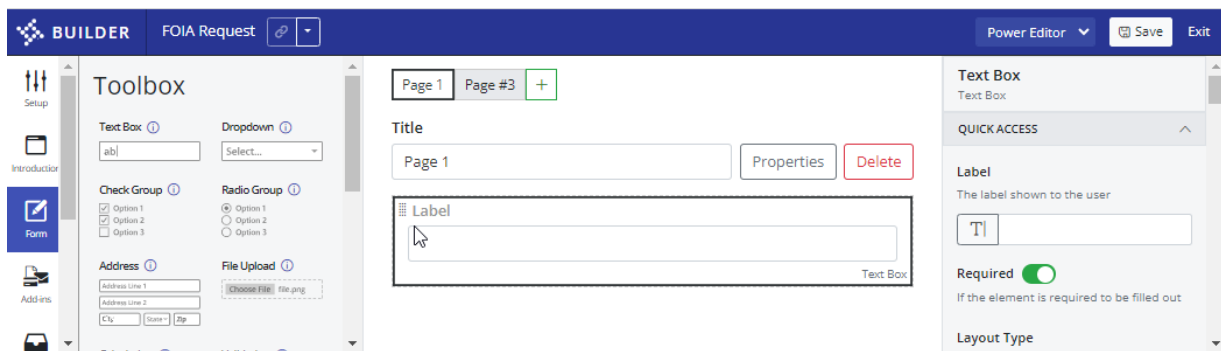
Note: This page is only available for Submittable Form and Workflow form types.

- **Toolbox** pane – Contains drag-and-drop options you use to build an engagement.
- **Form** pane – Displays toolbox options you place on the page.
- **Settings** pane – Displays the settings for the selected Toolbox options.



Manage Toolbox Elements

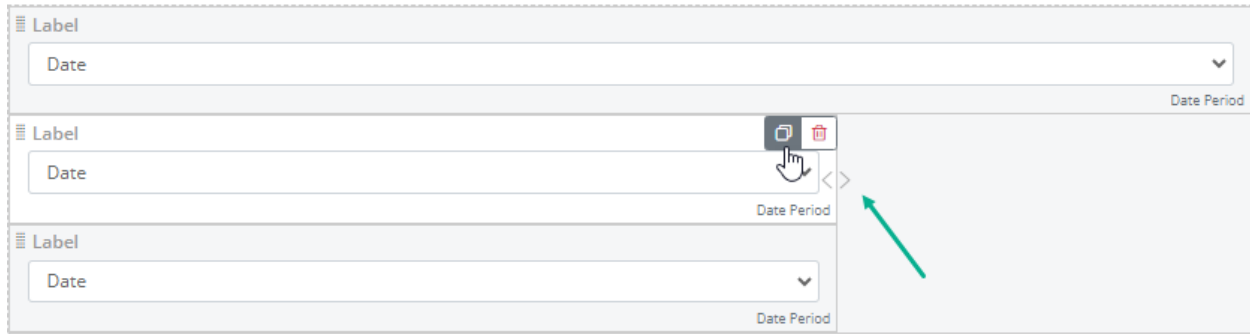
This section contains information about the Toolbox elements and corresponding Settings. When building an engagement, if you click the toolbox element on the Form pane, the Settings pane displays the properties for that element.



You can clone an element or resize it in the Form pane.

- To clone an element, click the **Clone** icon.
- To resize an element, on the right margin, click the **Resize** arrow and drag the element across the Form pane.

- To delete an element, click the **Delete** icon.



Refer to [Appendix A](#) for information on how to manage setup options for toolbox elements.

Configure Payments

The Payment add-in allows you to configure payments for collection from a resident. Payments come from designated agency funds and are associated with service codes. These codes are set up by your Tyler Technologies administrator.

Payment configurations can be set up to be available to all your engagements or limited to engagements within a specific stie or folder.

To configure a payment:

1. In the Builder left navigation pane, click the **Add-ins** icon and select **Payment** from the list of options.
2. On the Payment pane, in the **Admin Display Label** field, enter a label that displays to the administrator.
3. Optional. In the **Process Payment Later (Pre-authorize)** field, click the button to turn on the option.
4. In the DEPOSIT GROUP section, in the **Payment Configuration** drop-down list, select a configuration.

Note: If the configuration (service code) you need is not displayed in the list, contact your administrator. Service codes are set up in TPE.

5. To add an override, in the **Payment Configuration Overrides** field, click **Add** and select the following options.

Note: Overrides are used when there is more than one fund set up for payments. For example, an agency may have a main fund for payments and a second fund for donations. The override allows you to insert a calculation so if the value in a donation field is greater than zero, the override points to a separate service code.

- **Condition** – Click the [Input a calculation](#) link to select a condition to apply the override. In the Edit Calculation window, select a condition and click **OK**.
- **Payment Configuration** – From the drop-down list, select a configuration.

6. In the **Local Ref field**, enter text, an element, or a calculation.
7. In the **Receipt Custom Text** field, enter text, an element, or a calculation. This is custom text that displays on the CCP receipt page.
8. In the **Submit Button Text** field, enter text, an element, or a calculation. The default is **Continue to Payment**.
9. In the BILLING INFO section, select or enter text, an element, or a calculation you want to pass to the payment provider for the following fields.
 - **Billing Name**
 - **Billing Company Name**
 - **Address One**
 - **Address Two**
 - **City**
 - **State**
 - **Zip**
 - **Phone**
 - **Email**
10. In the ITEMS section, in the **Payment Items** field, click **Add** and enter text, an element, or a calculation in the following fields.
 - **SKU**
 - **Description**
 - **Unit Price**
 - **Quantity**
11. In the OTHER section, in the **API ID** field, enter the label provided through the API.

Workflow Engagements Overview

Workflow engagements are similar to Submittable Forms, with backend processing, that allows you to define the resident user experience.

Note: An element or activity outlined by an orange box indicates a task.

Create a Workflow Engagement

A workflow engagement is one that requires users to perform a series of activities to complete a task.

To create a workflow engagement:

1. In the left navigation, click the **Sites** icon.
2. Select the site or folder from the **Sites** list.
3. Click the **New Engagement** button.
4. On the New Engagement page, complete the following tasks.
 - **Name** – Enter a name for the engagement.
 - **Type** – Select **Workflow**.
 - **Description** – Enter a description for the engagement.
5. Click **Create**.

Refer to [Appendix B](#) for information on how to manage setup options for workflow engagements.

Create a Workflow Engagement

A workflow engagement is one that requires users to perform a series of activities to complete a task.

To create a workflow engagement:

1. In the left navigation, click the **Sites** icon.
2. Select the engagement site or folder from the **Sites** list.
3. Click the **New Engagement** button.
4. On the New Engagement page, complete the following tasks.
 - **Name** – Enter a name for the engagement.
 - **Type** – Select **Workflow**.
 - **Description** – Enter a description for the engagement.
5. Click **Create**.

Manage Setup Options for a Workflow Engagement

The Setup page displays the high-level information you provided when creating the engagement along with additional options.

To manage setup options:

1. Enter information in the following fields:
 - **Name** – This is the name of the engagement you entered on the New pane. The **Name** displays to the users and under the **Label** column in the Admin.
 - **Version Label** – This field displays to the user and allows you to differentiate between versions of an engagement.

- **Display Label** – Optional. This can be used to make the form more robust such as pulling in form data. However, if no content is added, the form defaults to the information provided in the **Name** field. Click the [Input a calculation](#) link. In the Edit Calculation window, select a calculation and click **OK**.
- **Description** – This information displays in the directory and search results.
- **Type** – This is the type of engagement you selected. Refer to [Engagement Types](#) for more information.
- **Name in URL** – It is recommended that you provide a URL to avoid maintenance issues, such as dealing with multiple strings of IDs in the public URL your site (for example, `foia-request`). The URL makes direct linking more manageable.
- **Allow Multiple In-Progress Forms** -This option is turned off by default and it is recommended that you leave the default setting. The option allows a user to open multiple in-progress forms, which can be confusing to a user.

2. Click **Save**.

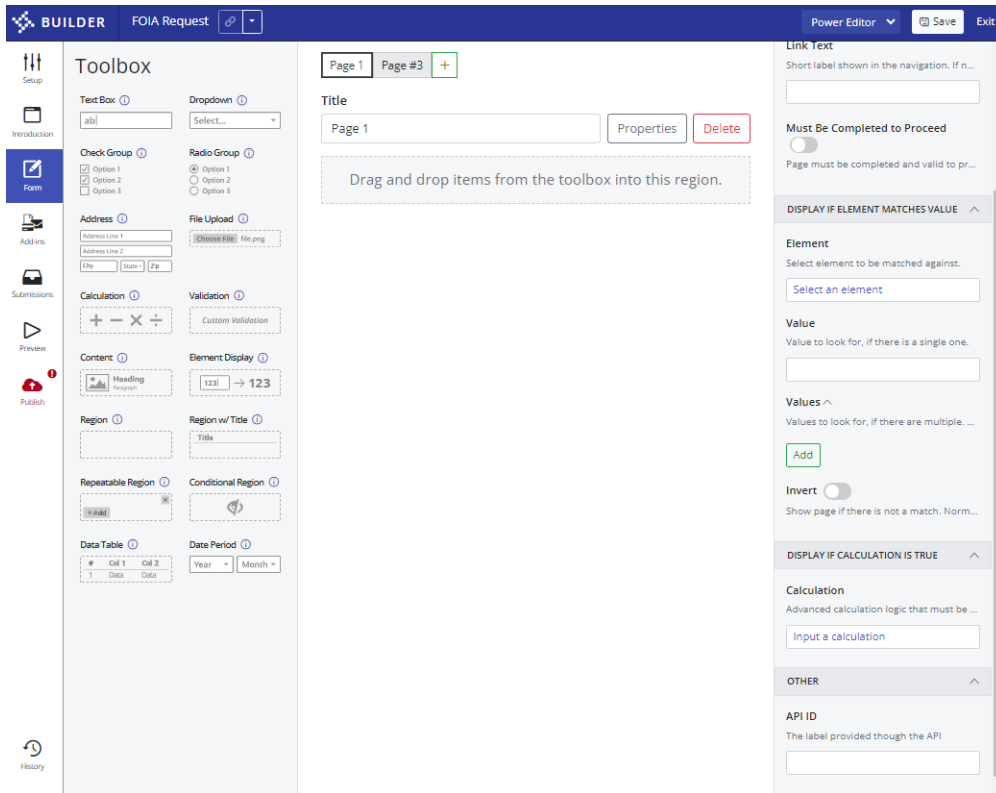
Manage Form Elements for a Workflow Engagement

This page lets you build the actual application. The page contains a Toolbox, Form, and Settings section.

Note: This page is only available for Submittable Form and Workflow form types.

- **Toolbox** pane – Contains drag-and-drop options you use to build an engagement.
- **Form** pane – Displays toolbox options you place on the page.
- **Settings** pane – Displays the settings for the selected Toolbox options.

For a detailed list of Toolbox options, refer to [Manage Toolbox Elements](#) or refer to [Appendix A](#) for information on how to manage setup options for toolbox elements.



Manage Workflow Activities and Add-ins

After you design a workflow engagement, you need to manage the flow of activities using the drag-and-drop functionality provided.

1. On the Engagement Builder page, click the **Sites** icon in the left navigation.
2. On the Sites page, locate and click the Site that contains the engagement you want to edit.
3. On the Sites pane, click the **Edit** icon for the workflow engagement. to access the Builder.
4. In the Admin Builder, in the left navigation, select **Workflow**.
5. In the Workflow pane, drag and drop activities from the **Activities** list.
6. To create the flow of tasks, click the black dot on an element and drag to another element.
7. To update an element, click the Activity to display the element setup options.
8. Click **Save**.

Publish an Engagement

After you design an engagement, you need to publish it so it is available to residents.

1. In the left navigation, select **Publish**.
2. On the Publish page, verify that all pending changes have been saved.
3. In the Marketing section, select the following options.
 - **Include in Directory** – Toggle this option **On** or **Off** depending on whether you want the engagement to be available in a public directory.

- **Tags** – Select all tags you want to use for directory options, filter options, and search criteria.
 - **Keywords** – Select keywords to include in search criteria.
 - **Related Engagements** – Add any engagements that are related to this engagement.
 - **gov2go** – Toggle this option **On** or **Off** depending on whether this engagement will be published in the Gov2Go directory.
 - **Visibility** – Select an option for how and when the engagement becomes visible to the user.
4. Click **Publish**.

Preview Page

This page lets you preview the form you are creating prior to submitting it for publication. This feature is great for lightweight validation testing as opposed to test mode. Test mode creates a real submission with a more accurate representation of the engagement.

Preview mode does not preserve your data which means you have to return to the Introduction page and start over.

Important: Test mode, which is available when you select the **Test URL** option from the Builder top navigation, is a better representation of how the final form will look and function. Test mode lets you create a real submission, review, test, and preserve your information.

Manage Submissions

The **Test Submissions** option is role based and not available to all users. For example, only quality assurance (QA) engineers may have this option to perform User Acceptance Testing (UAT).

To search for a submission:

1. In the left navigation, click the **Submissions** icon.
2. On the Submissions page, from the **Form** drop-down list, select a form.
3. Enter the Start Date and End Date.
4. Enter information in the following Search filter fields.
 - **Last Name**
 - **Email**
 - **Phone**
5. Select one or more status from the list.
6. Click **Search**.

Administer Branding and Style Options

A user with administrator access can access the Tenants page, where the branding and style options that are displayed to residents can be managed. This role is typically handled by Tyler Technologies staff on behalf of customers. Below is a description of the options and configurations available for branding and style.

Typically, you set up branding at a site level but if you want to apply the same brand to every site within a tenant, you can do some from the Tenant page.

To manage a site's branding:

1. In the Admin site, in the left navigation, click the **Tenants** icon.
2. In the Tenants page, locate the tenant, and click **Edit**.
3. On the Edit page, click the **LOGO** down arrow.
4. Click **Chose File** and select the logo file you want to upload.
5. In the **Custom Footer HTML** field, enter the footer text.
6. In the **Customer Error HTML** field, enter error message content.
7. Click **Save**.

To manage a site's design:

1. In the Admin site, in the left navigation, click the **Tenants** icon.
2. In the Tenants page, locate the tenant, and click **Edit**.
3. On the Edit page, click the DESIGN down arrow and enter information in the following fields.
 - **Primary Color** – This applies to the color on the top navigation bar.
 - **Secondary Color** – This applies to buttons that display in the site.

- **Style Editor Mode** – If selected, this disables caching so you can view updates faster and avoid wait time.
- **Custom LESS** - Enter syntax. This is a preprocessor language for styles and supports native CSS.

4. Click **Save**.

Appendix A: Toolbox Elements

This appendix contains details about toolbox elements you use to build engagements.

Text Box

Drag and drop the **Text Box** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Layout Type** – Select an option from the drop-down list for the control layout.
 - **Single-Line** – Provides a single line of entry in the Label field.
 - **Multi-Line** – Provides the ability to enter multiple lines of text.
- **Data Type** – Select an option from the drop-down list that is used to validate the type of data entered by a user. Data in any other format will fail validation.

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Default Value** – Enter text, element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Placeholder** – Enter 'ghosted' text that disappears on focus.
- **Layout Type** – Select an option from the drop-down list for the control layout.
 - **Single-Line** – Provides a single line of entry in the Label field.
 - **Multi-Line** – Provides the ability to enter multiple lines of text.

FORMAT

- **Data Type** – Select a data type from the drop-down list. This is used to validate data entered by a user.
- **Use Datepicker** – Toggle this option **On** or **Off**.
- **Min Length** – Enter the minimum length of input characters a user can submit for **Data Type**.
- **Max Length** – Enter the maximum length of input characters a user can submit for **Data Type**.
- **Input Mask** – Select an option from the list to limit the characters a user can enter.
- **Reverse Mask** – Default is **Off**. If set to **On**, the information is masked.
- **Output Mask** – Enter the output format used to mask data. For example, output mask for an SSN would be *****-**-1111** to only display the last four digits.
- **Prefix Text** – Enter text you want prepended to the textbox.
- **Suffix Text** – Enter text you want appended to the textbox.

VALIDATION

- **Required** – Defaults to **On**, which requires information for all VALIDATION element fields.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.
- **Required Regex Match** – Enter a regex pattern to require a match.
- **Regex Match Validation Message** – Enter a validation error that displays if the value does not match the regex pattern.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Dropdown

Drag and drop the **Dropdown** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether resident (end user) must provide information in the text field.
- **List Type** – Select an option from the drop-down list for the control layout.
 - **Custom** – provides a single line of entry in the Label field.
 - **Stock** – provides the ability to enter multiple lines of text-Line to provide a single line for text entry.
 - **Data Source** -

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Default Value** – Enter text, element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Placeholder** – Enter 'ghosted' text to the textbox that disappears on focus.

ITEMS

- **List Type** – From the drop-down list, select the type of list you want to display.
- **Items** – Based on the type of list you selected, you can select an item from the **Stock List** drop-down, **Data Source Table** drop-down, or click **Add** and enter the required information to create a customized item.
- **Sort List** – This option defaults to **On**, which allows you to sort the list.

VALIDATION

- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Check Group

Drag and drop the **Check Group** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident must provide content for the label.
- **Items** – Click **Add** to add checkable options.
 - **Label** – Enter the label name that displays to the resident.
 - **Value** – Enter a unique value for the item.
- **Short Label** - Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Default Value** – Enter text, element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Layout** – From the drop-down list, select a layout type.
 - **Default** – Items follow the default style.
 - **Single Label** – Allows you to enter a single label.
 - **Per-Field Labels** –
 - **Allow International** – Defaults to Off, which determines whether international addresses are allowed.

ITEMS

- **Items** – Click **Add** to add checkable options.

- **Label** – Enter the label name that displays to the resident.
- **Value** – Enter a unique value for the item.
- **Short Label** - Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.

VALIDATION

- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Radio Group

Drag and drop the **Radio Group** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident must provide content for the label.
- **Items** – Click **Add** to add checkable options.
 - **Label** – Enter the label name that displays to the resident.
 - **Value** – Enter a unique value for the item.
 - **Short Label** - Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Default Value** – Enter text, element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Layout** – From the drop-down list, select a layout type.
 - **Default** – Items follow the default style.
 - **Stacked** – Items display in stacked format.

- **Label on Top** – Label displays at the top of the element.
- **Inline** – Items generate additional questions for residents.

ITEMS

- **Items** – Based on the type of group you selected, you can add an item to the group and provide content for the **Label**, **Value**, and **Short Label**.

VALIDATION

- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Address

Drag and drop the **Address** element onto the Form section and enter or select the following options in the Settings section.

Note: The address variables are pre-formatted.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident must provide content for the label.
- **Allow International** – Defaults to **Off**, which determines whether a resident can enter an international address in the field. If set to **On**, the **Country** field is added to the engagement.

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Address Line One Default Value** – Enter a default value, which can be text, an element, or a calculation.
- **Address Line Two Default Value** - Enter a default value, which can be text, an element, or a calculation.
- **City Default Value** – Enter a default value, which can be text, an element, or a calculation.
- **State/Province/Region Default Value** – Enter a default value, which can be text, an element, or a calculation.

- **Zip/Postal Code Default Value** - Enter a default value, which can be text, an element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Layout** – From the drop-down list, select an option.
 - **Default**
 - **Single Label**
 - **Per-Field Labels**

VALIDATION

- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

File Upload

Drag and drop the **File Upload** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident must provide content for the label.
- **Accepted File Extensions** – Click **Add** and enter acceptable files extensions (without the period). Any other file extension results in a validation error. If not specified, any file extension is acceptable.
- **Max Permitted File Size** – Enter the maximum allowable file size using metric values (for example, MB or KB).

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- calculation.
- **Help Text** – Enter help text you want to display to the user.

Calculation

Drag and drop the **Calculation** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** – Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Calculation** – Enter the calculation to be used in the engagement. Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.
- **Layout** – From the drop-down list, select an option.
 - **Default**
 - **Invisible**
 - **HTML**
- **Max Permitted File Size** – Enter the maximum allowable file size using metric values (for example, MB or KB).

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Help Text** – Enter help text you want to display to the user.
- **Calculation** - Enter the calculation to be used in the engagement. Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.
- **Layout** – From the drop-down list, select an option.
 - **Default**
 - **Invisible**
 - **HTML**

OTHER

- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Validation

Drag and drop the **Validation** element onto the Form section and enter or select the following options in the Settings section.

VALIDATION

- **Require to be True** – Enter the calculation to be used in the engagement. Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.
- **Invalid Message** – Enter the validation message to display to the resident if the content in the **Require to be True** field is invalid.
- **Only Validate on Section Change or Submit** – Defaults to Off and is used to validate information only when changing a section, saving, or submitting the engagement.

OTHER

- **API ID** – Enter the label provided through the API.

Content

Drag and drop the **Content** element onto the Form section and enter or select the following options in the Settings section.

LAYOUT

- **Content** – Enter the 'raw' HTML text that goes in the context block.
- **Indent** – Enter the size of indent to apply to the content block including the unit (for example, 100 px).
- **CSS CLASSES** – Enter the CSS classes that apply to the context block.

OTHER

- **API ID** – Enter the label provided through the API.

Element Display

Drag and drop the **Element Display** element onto the Form section and enter or select the following options in the Settings section.

LAYOUT

- **Element to Display** – Click the [Select an element](#) link to display the Select Element window. Click an element to add to the layout.

OTHER

- **API ID** – Enter the label provided through the API.

Region

Drag and drop the **Region** element onto the Form section and enter or select the following options in the Settings section.

- **Content** – Enter the 'raw' HTML text that goes in the content block.
- **Indent** – Enter the size of indent to apply to the content block including the unit (for example, 100 px).
- **CSS CLASSES** – Enter the CSS classes that apply to the content block.

OTHER

- **API ID** – Enter the label provided through the API.

Region w/Title

Drag and drop the **Region w/Title** element onto the Form section and enter or select the following options in the Settings section.

LAYOUT

- **Title** – Enter the title that displays to the user.
- **Description** – Enter a description of the title that displays under the Title.

OTHER

- **API ID** – Enter the label provided through the API.

Repeatable Region

Drag and drop the **Repeatable Region** element onto the Form section and enter or select the following options in the Settings section.

LAYOUT

- **Label** - Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Add Button Text** – Enter the text you want to display on the add button.
- **Min** – Enter the minimum number of repeatable elements that can apply. If not specified, the limit is zero.
- **Max** – Enter the maximum number of repeatable elements that can apply. If not specified, the limit is zero.

OTHER

- **Items Calculation** Enter the calculation to be used in the engagement. Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.
- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **API ID** – Enter the label provided through the API.

Conditional Region

Drag and drop the **Conditional Region** element onto the Form section and enter or select the following options in the Settings section.

DISPLAY IF ELEMENT MATCHES VALUE

- **Element** – Click the [Select an element](#) link to display the Select Element window. Select an option from the list to match against the selected Region.
- **Value** – Enter a value for search criteria. Click **Add** to include more values on which to search.
- **Invert** – Defaults to **Off**, which determines whether region display if there is not a match.

DISPLAY IF CALCULATION IS TRUE

- **Calculation** – Enter the calculation to be used in the engagement. Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.

OTHER

- **API ID** – Enter the label provided through the API.

Data Table

Drag and drop the **Data Table** element onto the Form section and enter or select the following options in the Settings section.

- **Data Source Table** – From the drop-down list, select a data source table.
- **Rows From Calculation** – Click the [Input a calculation](#) link to display the **Edit Calculation** dialog box. Select a calculation from the list and click **OK**.
- **Show Row Number Column** – Defaults On and determines whether to display the row number column at the start of a row.
- **Selectable** – From the drop-down list, select an option to determine if and how the table is selectable.
- **Columns** – Click **Add** to specify which column display in the table. Specify the column heading text, which column to display, and the display type for column values.
- **Default Sort** – From the drop-down list, select column on which to sort data.

- **Default Page Size** – Select the number of rows to display to the user. If the number of rows returned is less than the default page size, paging controls are hidden.

OTHER

- **API ID** – Enter the label provided through the API.

Data Period

Drag and drop the **Data Period** element onto the Form section and enter or select the following options in the Settings section.

QUICK ACCESS

- **Label** - Enter the label name that displays to the resident. This can be text, an element, or a calculation.
- **Required** – Defaults to **On**, which determines whether the resident (end user) must provide information in the text field.
- **Data Period** – From the drop-down list, select a date value.

LAYOUT

- **Label** – This is the same as the **Label** field in the **QUICK ACCESS** section above.
- **Short Label** – Enter a shorter label that displays to the user when needed (for example, use for validation messages). This label is also passed to exported submissions CSV column heading but defaults to the **Label** text if left blank.
- **Default Value** – Enter the default value, which can be text, an element, or a calculation.
- **Help Text** – Enter help text you want to display to the user.
- **Date Period** – From the drop-down list, select a date value.
- **Past Years** – Enter the number of years back to allow in the table.
- **Future Years** – Enter the number of future years to allow in the table.
- **Layout** – From the drop-down list, select a layout style for control content.

VALIDATION

- **Required** – Defaults to **On**, which requires information for all VALIDATION element fields.
- **Required Validation Message** – If validation is required, you can enter a validation message or leave the field blank and use the default message.

OTHER

- **Repopulate on New Form** – Defaults to **Off** and is used to determine whether to repopulate the value of this control when starting a new form that the user previously submitted.
- **Show on Export** – Defaults to **On** and is used to determine whether to include the information in an Admin export.
- **API ID** – Enter the label provided through the API.

Appendix B: Manage Setup Options for a Workflow Engagement

The Setup page displays the high-level information you provided when creating the engagement along with additional options.

To manage setup options:

1. Enter information in the following fields:
 - **Name** – This is the name of the engagement you entered on the New pane. The **Name** displays to the users and under the **Label** column in the Admin.
 - **Version Label** – This field displays to the user and allows you to differentiate between versions of an engagement.
 - **Display Label** – Optional. This can be used to make the form more robust such as pulling in form data. However, if no content is added, the form defaults to the information provided in the **Name** field. Click the [Input a calculation](#) link. In the Edit Calculation window, select a calculation and click **OK**.
 - **Description** – This information displays in the directory and search results.
 - **Type** – This is the type of engagement you selected. Refer to [Engagement Types](#) for more information.
 - **Name in URL** – It is recommended that you provide a URL to avoid maintenance issues, such as dealing with multiple strings of IDs in the public URL your site (for example, `foia-request`). The URL makes direct linking more manageable.
 - **Allow Multiple In-Progress Forms** -This option is turned off by default and it is recommended that you leave the default setting. The option allows a user to open multiple in-progress forms, which can be confusing to a user.
2. Click **Save**.

Manage Form Elements for a Workflow Engagement

This page lets you build the actual application. The page contains a Toolbox, Form, and Settings section.

Note: This page is only available for Submittable Form and Workflow form types.

- **Toolbox** pane – Contains drag-and-drop options you use to build an engagement.
- **Form** pane – Displays toolbox options you place on the page.
- **Settings** pane – Displays the settings for the selected Toolbox options.

For a detailed list of Toolbox options, refer to [Manage Toolbox Elements](#).

- Setup
- Introduction
- Form**
- Add-ins
- Submissions
- Preview
- Publish
- History

Toolbox

Text Box

Dropdown

Check Group
 Option 1
 Option 2
 Option 3

Radio Group
 Option 1
 Option 2
 Option 3

Address
 Address Line 1
 Address Line 2
 City State Zip

File Upload file.png

Calculation

Validation

Content

Element Display →

Region

Region w/ Title

Repeatable Region

Conditional Region

Data Table

#	Col 1	Col 2
1	Data	Data

Date Period Year Month

Page 1 Page #3 +

Title

Page 1

Drag and drop items from the toolbox into this region.

Link Text
Short label shown in the navigation. If n...

Must Be Completed to Proceed

Page must be completed and valid to pr...

DISPLAY IF ELEMENT MATCHES VALUE ^

Element
Select element to be matched against.

Value
Value to look for, if there is a single one.

Values ^
Values to look for, if there are multiple ...

Invert
Show page if there is not a match. Norm...

DISPLAY IF CALCULATION IS TRUE ^

Calculation
Advanced calculation logic that must be ...

OTHER ^

API ID
The label provided though the API